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ABSTRACT

A two-year strategic planning methodology is presented by which college administrators can develop a framework for institutional decision-making. After introductory material describing the theoretical characteristics of the methodology, the report outlines and discusses eight basic planning components: (1) developing a context for strategic planning based upon an identification of the institution's mission, external demands, internal strengths and weaknesses, and operational priorities; (2) identifying individual institutional functions, or strategy centers, which require unique management styles; (3) understanding the position of the individual institution within the higher education enterprise, and assessing the maturity of the delivery system; (4) identifying and serving clientele through the orchestrated efforts of the institutional network, including alumni, parents, and students; (5) assessing institutional strengths and competitive position; (6) selecting strategies appropriate to a strategy center's maturity and market strength; (7) analyzing implementation requirements for congruity and risk; and (8) establishing an implementation program. Suggested operational procedures are followed by a discussion of the use of consultants in the planning process and the time and cost benefit criteria to be considered. (JP)

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# COLLEGE AND UNIVERSITY STRATEGIC PLANNING

## A Methodological Approach

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## NOTE

This paper outlines a college and university strategic planning methodology developed at the Arthur D. Little Management Education Institute. The basic approach was formulated through extensive Arthur D. Little, Inc. work with many types of organizations including private-for-profit, non-profit and government owned enterprises. Through research, field work, and client assignments, the strategic concepts in this methodological approach were modified and augmented for specific use in colleges and universities. A bibliography is included to provide a list of readings which amplify the ideas expressed herein and to suggest that many strategic planning concepts have both currency and applicability to higher education.

The stratetic planning methodology is offered as a consulting service by Arthur D. Little, Inc. to institutions of higher education. It is also noted that the methodology is supported by a process guide and other materials which are used in the course of client assignments.

The following people have also contributed to the strategic planning ideas and concepts presented here: Robert M. Abramson, Douglas M. Anderson, John M. Carroll, James Farmer, Samuel C. Fleming, Richard F. Messing, Marshall R. Noecker, John B. Quick, J. Paul Sanderson, Richard P. Schneider, Christopher E. Smith, Wilford H. Welch, John R. White, Burton I. Wolfman, and Robert V.L. Wright.

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## INTRODUCTION

Colleges and universities have proved to be both enduring and adaptable. They have always accepted a leadership role in society and have deflected pejorative forces. Over the years, they have also accommodated change and actively pursued renewal. Moreover, institutions of higher education have passed through a number of significant periods of unrest and resultant development. If history is a fair judge, the current issue is not whether colleges and universities will survive; instead it is what their purpose and nature will be after this current period of unrest passes. A related question is whether we simply wait for environmental change to occur and then modify our institutions accordingly? If we want control over institutional direction, it is necessary to plan and to manage in a rational decision-oriented manner. Ambitions should be reassessed while institutions plan to condition and promote quality through their strengths.

If institutions are to plan well, they must conduct a carefully considered review of their values, ambitions, and image. They must carefully examine the nature of the external environment in which they operate. They must look inward and assess their strengths, weaknesses and balance. And they must begin taking a broader view of themselves as organizations in the public trust which serve a variety of important social aims. Moreover, colleges and universities must begin to more fully understand the nature of their many activities, their multi-functionality, and the means of managing diversity. They must also become more informed about their role in the education enterprise and the effects of their competition and cooperation with other institutions. Increased knowledge of clientele groups and external publics is increasingly important. Next, the college and university of today must learn to position itself to provide a high level of quality programs and services to a carefully selected clientele. The institution must then select strategies which will carry it into the future with a minimum of wasted resources. Above all, the institution must keep a keen vigilance for opportunity to provide additional service to society.

The college and university will find strategic planning appropriate for meeting these requirements. All forms of institutional planning contain strategic elements, and these elements can be assembled in a variety of ways each of which yield a different form or approach to institutional renewal. This paper describes one methodology for strategic planning and management and offers some discussion of related process concerns. The ideas expressed are not necessarily new; instead they represent a synthesis of familiar concepts which attempts to create a rational, efficient and effective approach to many problems facing higher education today.

## A STRATEGIC PLANNING METHODOLOGY

This methodology is designed to augment existing planning and management systems by developing alternative perspectives of institutional action in an ever-changing environment. It is driven by conditions, not ambitions. All approaches to strategic planning result from a synthesis of theory, concept, and process. The methodology presented here draws upon general theories of organization and administration. Its conceptual basis reflects accepted assumptions about planning, management, and decision-making in higher education and the process results from field work and experience with the implementation of strategic planning in colleges and universities. Many institutions currently use some form of strategic management. The characteristics and components of this methodology should be familiar to the educational manager. The arrangement of the components and the resultant relationships may be new.

### Characteristics

Strategic planning is very much a state of mind. It is a way of addressing and making important institutional decisions on a daily basis. The educational manager is asked to continually assess environmental conditions, to set objectives in the context of those conditions, and to set resources and action in the direction of the objectives. This strategic planning methodology is not a "black box" model nor does it bring quick and easy answers to the institution. Instead, it is a prescription for hard work. The methodology cannot be packaged, sold or purchased. It can only be used; if not practiced by institutional managers, strategic planning does not exist.

This methodology is also a definitional system which provides a context and structure for required institutional decision-making. It provides a means of identifying appropriate theories, concepts, procedures, and practices in a common and consistent manner. More importantly, the methodology assists the decision-maker with the selection of appropriate planning procedures. And it facilitates the translation of these procedures into practice and action. At the same time, it promotes institutional reflection of its unique circumstances in the context of its environment.

Also part of the strategic planning methodology is an analytic framework which serves to guide (but not direct or constrain) the decision-maker. This framework, consisting of concepts and relationships, suggests appropriate approaches to data gathering, to thought, to analysis, and to action. It provides the tools to build a model for decision-making that is tailored to institutional circumstances and to an institution's management style. This strategic planning methodology is also a language designed to facilitate communication across structural, functional and programmatic boundries. It provides a mechanism for all parties involved in a particular decision to make appropriate contributions and to understand the various effects of each decision.

This strategic planning methodology also offers a process for developing multifunctional interdependent strategy sets which guide a comprehensive institutional purpose and thrust. It assists managers with an understanding of the gestalt of their institution, and focuses attention on institutional direction, velocity, style, quality, character, dimensions and destination. The methodology also provides a system of congruency tests used to align and synchronize the various institutional administrative systems. Strategies and related decisions made either consciously or by default are compared to the institution's management style, its financial posture, its development program, and its ability to absorb risk.

The methodology can also be viewed as a management and organizational development device. Even if a strategic plan is never developed or used, the strategic planning process serves to enhance the capabilities of both administrators and the institution in which they work. Managers begin to internalize the methodological approach and begin to apply strategic concepts in their daily activity. The process also builds on increased communication and facilitates an approach to problems and decision-making which is characterized by increased comprehensiveness and relevance.

Components

Eight basic components are used in this methodological approach to strategic planning. Each component can be addressed independently of the others and each provides a separate arena for research, for analysis, and for decision-making. Used together, these components will provide a system of strategic planning for colleges and universities. The system provides a comprehensive, deliberate, considered approach to the management of change, diversity and the many important issues which colleges and universities must address. Components of the methodology are:

(1) Developing a context for strategic planning. Assessing institutional values, image, mission, role and scope and development of an overall strategic posture for the institution.

(2) Identifying and defining strategy centers (natural businesses).* Develop an understanding of naturally related programs and activities which respond as a set to a particular mix of external conditions and may require different styles of management.

(3) Detailing the delivery system or "industry" in which each of the strategy centers function. Understand the role of the strategy center (institution) in the delivery system and identify the opportunities and constraints provided by the delivery system. Also, assess the state of "maturity" of the delivery system or "industry" as a guide to strategy selection.

*For the purpose here, strategy centers and natural business are synonymous.

(4) Networks, clientele and service areas. For each strategy center, define, segment, position, and orchestrate various networks and service areas. Develop a full understanding of clientele groups, their needs, and their perceptions.

(5) Assessing institutional strengths and competitive position. Determine the strategy center's role and strength in its delivery system or "industry" and how well it serves clientele groups. Also, assess for strategy centers relationships between mission, quality and resources.

(6) Selecting appropriate strategies. For each strategy center determine the best course of action and develop an understanding of the relationship among the selected strategies.

(7) Conduct strategic analysis. Analyze the implementation requirements associated with each strategy or strategy set. Review management systems, financial systems, marketing systems, congruency and risk.

(8) Develop strategy implementation programs. For each strategy center establish objectives, schedules, milestones, and evaluation procedures.

The basic ideas associated with each component are outlined below.

*Context for Strategic Planning*

Most institutions have at some time prepared a statement of purpose, a statement of goals and objectives, or a statement of mission, role and scope. Moreover, the institution has most likely found that the preparation of such statements facilitated internal communication, generated self-awareness, and aided organizational development. For both substantive and process reasons, statements of mission, role and scope are important to the college or university. However, for strategic planning purposes such statements are, while necessary, insufficient. They tend to be expressions of ambition but not of conditions. Also, these statements project from inside the institution out, but do not typically capture the projection of external conditions into the college or university. Therefore, it is necessary to augment mission, role and scope activities.

First, an institution must develop a full understanding of its own value system. What are its ambitions? What is the image being projected by the school? Who carries the image? How is the image received, and how are challenges to the values and image handled? In short, how does a college or university describe its personality? Closely related to these questions is how the institutional mission is either reinforced or distorted by ambitions, values and images. In turn, to what degree does the statement of role reflect these ambitions, values, and images as opposed to being consistent with an objective assessment of internal conditions.

Second, what is the basic purpose or thrust of the institution? Should it be a two year school, a four year college, or a university? Should it be public, or independent, or state-related? Also, what is the range of opportunity facing the institution in its external environment? What actions will an institution's external publics permit? To what degree should government agencies, local communities, accreditation bodies, and providers of resources control the future of the college or university? Once these and other related issues have been addressed, an institution is in a position to reconsider its mission and to proceed with its planning.

Third, all colleges and universities must also address the development of an internal posture. What capability does the institution have to develop its opportunities? How can it meet the many concurrent demands of its external publics? To what degree should it attempt to cope with a rapidly changing environment? How can the school achieve internal harmony in the face of often competing external expectations, opportunities and constraints? Of course, the institution must also seriously consider how it would allocate its limited financial resource. After addressing these issues, the institution's statement of role can be reconsidered.

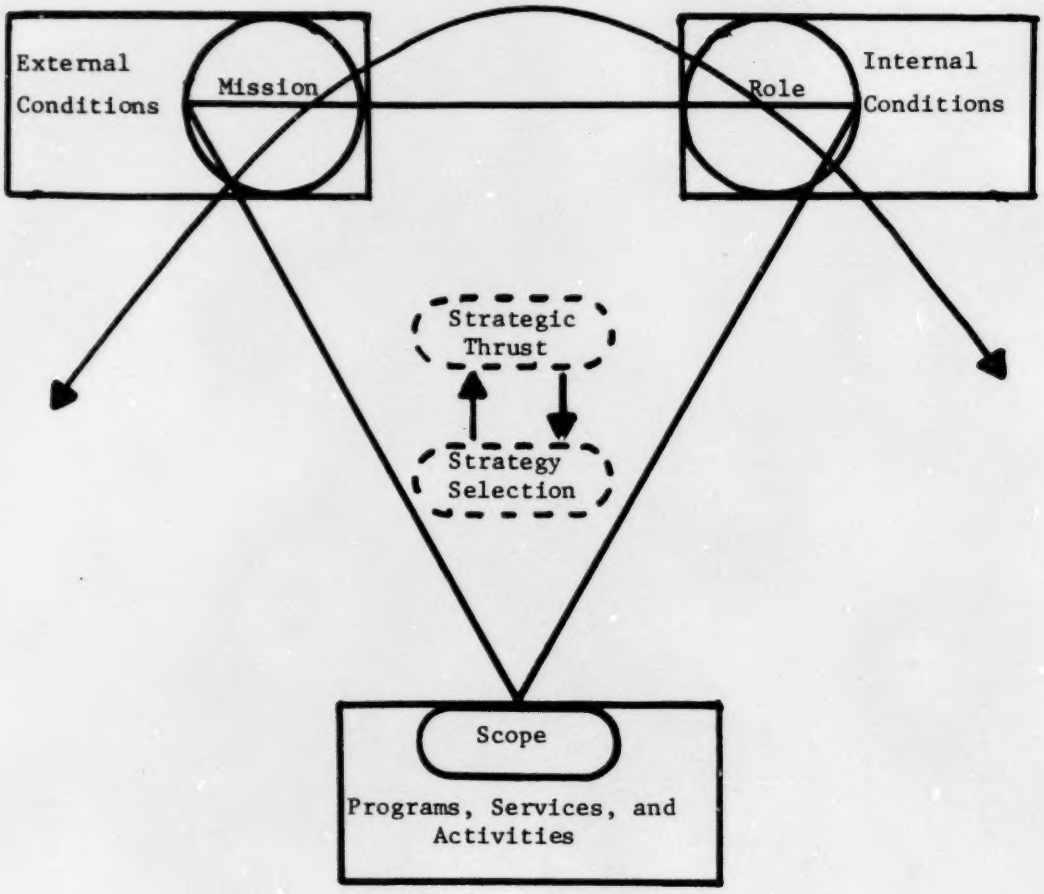
Once the personality, external conditions, and internal conditions of the institution are understood, how does it go about reviewing, adjusting, or accepting its mission, role and scope? What are the priorities, the trade-offs, and the margins? How much of an effect will various mission, role and scope decisions have on the everyday life of the institution? These questions ask about the nature of the college or university and how might it best proceed into an uncertain future.

A last question has to do with how an institution's statement of mission, role and scope is made operational. How does it establish a set of "working" purposes, priorities and assumptions. Specifically a college or university must consider the nature of its entity. Should it remain independent, change its status, or perhaps cease to exist? What accommodation is made to the external governance process? How responsive should an institution be toward its clientele groups? What are the best strategies for growth and renewal? How are finances best handled? What is the external governance structure and management style of the college or university? What is the internal governance structure for the school? How should the institution approach and deal with its external relationships? The resolution of these issues sets the strategic thrust of the institution and permits it to achieve maximum benefit from strategic planning.

Developing a context for strategic planning can be shown in graphic form as shown on the following page.

## A CONTEXT FOR STRATEGIC PLANNING

Values, Ambitions and Image




1. The intersection of values, ambitions, and image with external conditions gives a statement of strategic mission.

2. The intersection of values, ambitions, and image with internal conditions gives a statement of strategic roles.

3. From strategic mission and role an institution can derive a statement of strategic scope.

4. The statements of strategic mission, role and scope are made operational through the development of an institutional strategic posture or thrust.

5. Strategic thrust then serves as one basis for strategy selection.

*Identifying Strategy Centers*

A second fundamental strategic planning activity is the identification and explication of strategy centers or of natural programs and services. This step is necessitated by the fact that almost all organizations, colleges and universities included, are multi-functional. This is to say that educational institutions conduct several distinct sets of activities each of which respond to a different clientele and to a different set of external conditions. In turn, each of these natural sets of activities or strategy centers may require unique sets of strategies, management styles, financing, institutional strengths, performance measurement, etc.

Many educational institutions identify and separate for management purposes their internal functions, but this is done largely for the reasons of data collection, accounting, and control. Institutions also use program structures which tend to segment an institution into activities with similar production functions such as instruction, research, public service, etc. While these ways of viewing an educational organization are valid and useful, they tend to be inward looking as opposed to outward looking. They tend to be ambition more than condition driven and they particularly tend to ignore the very important external conditions of a college or university.

Strategy centers are often similar to institutional functions; they are also similar to program structures in many respects. However, strategy centers differ from functions and program structures in two important respects. First, they are institutionally defined in the context of specific internal and external conditions. Second, strategy centers link the purposes and objectives of an institution with external conditions and a set of specifically defined performance measures.

Each institution must define strategy centers for itself, however, some examples of potential strategy centers are:

- Undergraduate instruction programs for a student clientele
- Undergraduate instruction programs for an organizational clientele
- Continuing/adult instruction programs
- Conferences/short courses
- Graduate management programs
- Graduate medical/health programs
- Graduate professional programs
- Graduate research programs
- Grant and contract research
- Consulting and service operations
- Auxiliary operations
- Physical plant
- Management and administration
- Admissions and access (financial aid)
- Development operations
- Community services
- Independent operations

*Delivery Systems, "Industries" and Maturity*

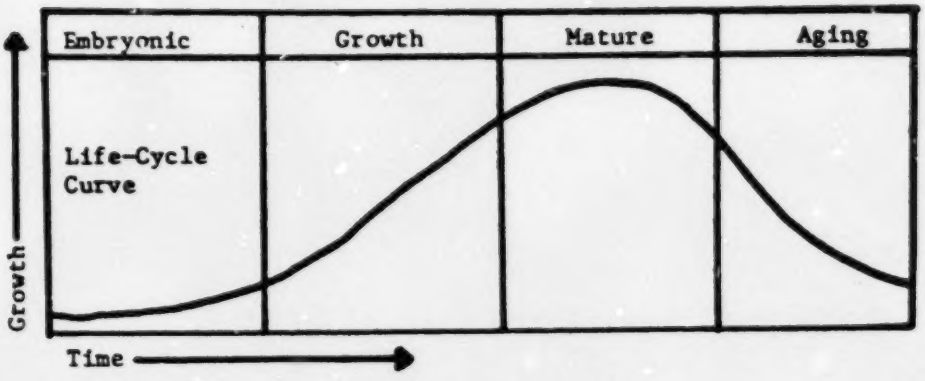
Strategic planning requires an institution to identify and define the delivery system(s) of which it is a part. Public colleges and universities are, of course, a part of their respective state systems or segments. Independent schools often participate in less formal delivery systems composed of peer institutions which serve a specific clientele or a specific set of values and ideals. Regardless of how the delivery system is defined, an institution should understand its role in its system(s). It should know what responsibility it has to the system and what responsibility the system has to the institution. And it should be able to assess the consequences of either side not meeting the assigned responsibility. In short, an institution must come to understand its position and role in the higher education enterprise; otherwise, it will have no way of mounting a strategic response to changes (often not controlled by the institution) in its delivery system environment.

Many institutions are not part of a delivery system and must face the environment alone without either support or responsibility. In these cases the institution must develop an understanding of the "industry" in which it participates. Each institutional strategy center operates in one or more industries. The industry(s) for each strategy center includes those organizations and activities that marketing people call the generic competition. For example, what kinds of activity may compete with a year of liberal arts education? The student could make an investment in travel, psychoanalysis, volunteer service, military service, or work. The industry also includes product form competition which suggests that several forms of the same program may compete with the strategy center in question. For example, a foundation could give its work and education grants to a community college, a technical institute, a community group, a four-year college, or a university. Third, the industry includes all those institutions that offer the same product or services as the institution and strategy center in question. Marketers call this enterprise competition. An undergraduate liberal arts strategy center would be, for example, in an industry composed of all colleges and universities which also offer a liberal arts education. It should be noted that the definition of an industry is a very judgmental process. Experience has shown, however, that an industry is best defined when it includes those other organizations and activities which are in day-to-day relationship with the strategy center in question. For example, all providers of four-year degree programs could be considered a part of one industry. However, it is often more realistic to separate such a large industry into more meaningful segments. In this connection, one could identify a four-year technical program segment, a medical segment, a liberal arts segment, and, say, a business and management segment.

The concept of delivery system or industry maturity and the criteria for identifying maturity is given only brief consideration here. In general terms, industries and delivery systems can conveniently be grouped into four stages of maturity. An embryonic industry is normally characterized

by rapid growth, changes in technology and quality, great pursuit of new clientele groups, and fragmented and changing shares of the market. A growth industry is one that is still growing rapidly, but clientele, shares, technology, and quality are better known and entry into the industry is more difficult. A mature delivery system is characterized by stability in known clientele, quality, and in shares of the market although market competition is still a factor and institutional strengths are important. Aging industries or delivery systems are best described by falling demand for programs and services, a declining number of institutions, and, in may industries, a narrowing of the range of programs and services offered by the many institutions in the industry or system. Industry maturity is often expressed with a life-cycle curve such as that shown below:

INDUSTRY MATURITY

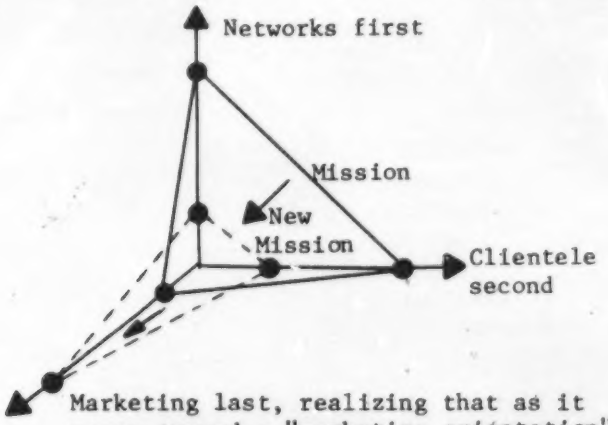



*Networks, Clientele and Markets*

Each institutional strategy center is normally part of a larger network that must be identified and explicated for strategic planning. As an example, institutions do not simply "sell" education to student "customers." Instead the institution (strategy center) as a part of a delivery system or industry provides services to its clientele through a network. The network in turn may be composed of alumni, friends, high school guidance councelors, parents, students and other institutional publics. In this connection, if an institution is to continue to do well it must first develop an understanding of its sociology. It must be able to select strategies that reinforce its network and enhance its sociological position. Once this is done, the college or university can then go on to assess its clientele and "psychological" position. Last, it can conduct market analysis based on its sense of network and clientele.

NOTE: This strategic planning methodology does not advocate the "market orientation" that is rapidly gaining popularity. Instead it calls for an institution to understand and better use its extant networks. It then

requires the college or university to make a deliberate attempt to better understand and serve its clientele. If these steps do not result in institutional viability, then (and only then) should the institution consider new approaches to marketing. And it is quickly noted that the latter is a serious step which may require a change in mission, role and scope. In graphic form an institution should strategically plan for:




Once the network is understood, the strategy center should make an assessment of the clientele groups which make up the "market." To do so, it is necessary to understand four motivations of the clientele - needs, perceptions, preferences and satisfaction. For example, a student may attend a college or university out of the need for education. At the same time, the student may perceive that he or she is acquiring a life style as well as obtaining an education. Third, the student will have a preference for, say, a small liberal arts college as opposed to a larger university. Last, an institution should assure consistency of synchronization among its programs and services, its clientele, and the market segments in which the clientele are located.

Market analysis (not necessarily market orientation) is also important for strategic planning. The first step in the analysis is to define the markets being served by the institution. Student groups would, of course, be one market. Other organizations and institutions may be another. Most institutions will also consider its immediate community and selected external publics as a market for programs and services. A market could include all agencies and organizations which provide research opportunities and monies. Also, most institutions find it beneficial to remain active in the philanthropic markets. These and all other institutional markets must be defined in detail to permit the selection of appropriate marketing strategies. The second step in the analysis is market segmentation. Put simply, markets should be divided into homogenous segments for analytic purposes. This is often accomplished through the creation of a matrix with important market

characteristics (geography, high school class rank, family income, educational plans, etc.) used for its dimensions. Third, the institution should search for appropriate market segments or niches and position itself in the market. Very seldom will an entire market be served by a single college or university. Put another way, an institution should approach a market segment on the basis of its strength and unique characteristics. Last, when an institution is in more than one market segment, it may be necessary to orchestrate the market - coordinate the approach to various market segments and balance the results of marketing activity.

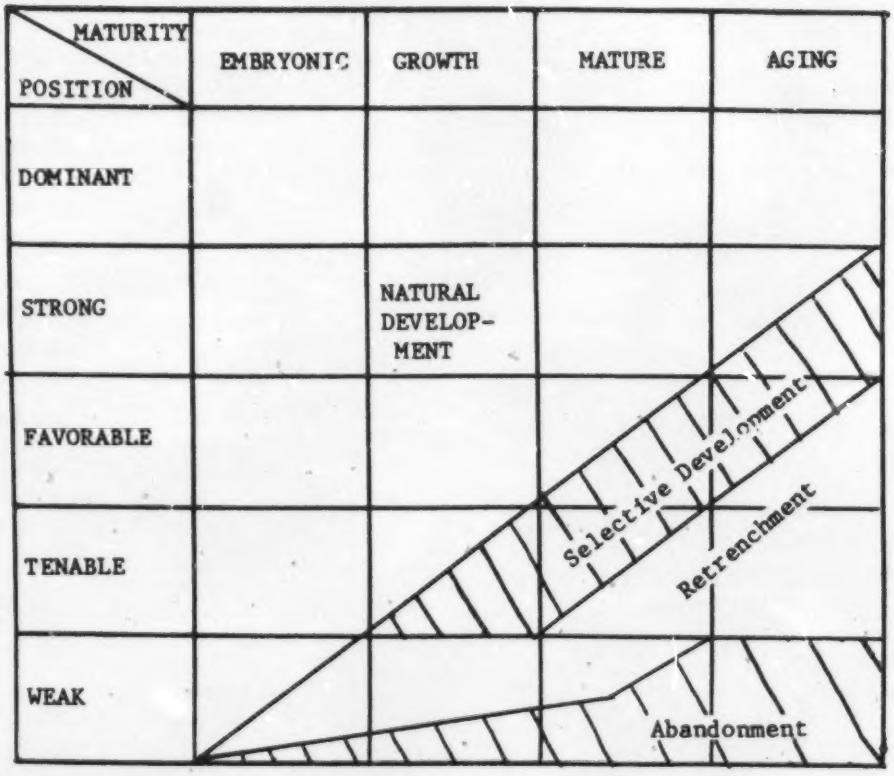
*Strategy Center Strength and Position*

As a strategy center acquires attributes over time and in relation to its delivery system, peers, industry, and/or competitors, it gains or loses strengths and viability. Alternatively, as a strategy center further develops its level of quality, it should solidify its position within the delivery system or industry, i.e., among its peer institutions. At any given time, a strategy center can be classified according to its strategic position in the field. It may be dominant, strong, favorable, tenable, weak, or in the worst case, non-viable. The importance of assessing an institution's viability position rests on the need to select strategies which are compatible with both delivery system (industry) maturity and institutional strength.

In the connection, strategic position is one of the most complex components of institutional analysis and one of the least understood. In the face of this complexity, there is a temptation to fall back on a single criterion to determine position such as share of clientele market or application pressure or graduation/FTE ratio. However, experience shows that strategic position can and must be treated by evaluating multi-criteria; for example, strength or faculty quality, breadth of programs and services, enrollments, clientele activity changes, and special relationships. It should also be noted that the relative importance of these factors change in relationships with changes in delivery system (industry) maturity.

Closely related to maturity, institutional strengths, and strategic position is something called strategic thrust. Put simply, the strategic thrust of a strategy center serves to define the range of individual strategies that may be reasonably selected. If, for example, a strategy center is in a weak position in a mature delivery system (industry), the selection of a retrenchment as opposed to selective development strategies may be more appropriate. Strategic thrust expressed on a matrix begins to suggest the viability and appropriateness of individual strategies.

## STRATEGIC THRUST




*Strategy Selection*

Once a strategy center has been assigned a position on the strategic thrust matrix, individual strategies can be formulated. In essence, a strategy directs resource investment to a series (or program) of related actions which together constitute a selected path to a certain objective taking into account constraints on capital, expense and time.

Most administrators and planners have a sense of the strategic alternatives available to them. Moreover, when alternative strategies are compared one against the other, it is found that there are a reasonably small discrete number of available choices. That is, after personal value, conventional wisdom, and differential professional perception are factored out, there are only a limited number of strategies available to a strategy center to assist in the strategic planning process. It is helpful to use a "deck" of strategic choices. With the strategic thrust matrix as a framework, the appropriate "natural" (or generally presumptive) strategies can be identified for each combination of maturity and competitive position. Strategies selected this way are the "first cut" at strategy center strategy determination. Subsequent refinements from the generic to the specific then leads to final strategy selection.

It should be noted, however, that a strategy center is not always free to select appropriate strategies. A strategy center within an institution may find its selections precluded by internal trade-offs or external competitive moves. When an institutions long-term objectives conflict with full exploitation of a strategy center's natural advantage, or when the institution cannot appropriately fund all of its prime opportunities, a strategy center may be assigned strategies for the benefit of the institution. This becomes most apparent at resource allocation time or when an institution must change its direction or emphasis.

Examples of strategy center strategies are:

GROWTH STRATEGIES

- Development of new programs for new clientele groups.
- Offer same programs and services to new clientele groups.

CONTRACTION STRATEGIES

- To prune back the networks, clientele, and markets served.
- Modify and refocus the scope of programs and services.

HESITATION STRATEGIES

- Maintain (usually at added cost) present strategic position.
- Retain existing clientele and promote loyalty.

REVENUE STRATEGIES

- Increase development activities.
- Raise prices charged for programs and services.

EXPENSE STRATEGIES

- Develop more cost effective methods and functions.
- Traditional cost cutting (not retrenchment or RIF).

ADJUSTMENT STRATEGIES

- Increase quality and offer better programs.
- Increase overall productivity.

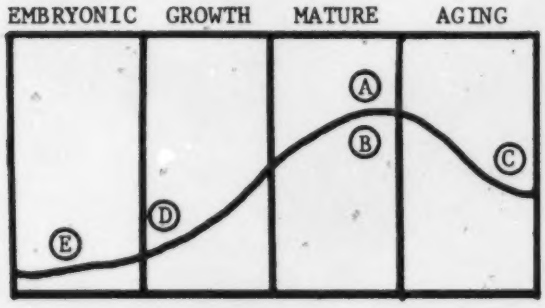
*Strategic Analysis*

After a strategy center has selected its strategies, the management systems, financial systems, networks, marketing posture, congruency, and risk should be analyzed. Just as maturity and strategic position vary among strategy centers, the management style associated with each strategy center may also vary. Thus, it is important to analyze the managerial requirements of each strategy center separately. The same holds for financial systems, approach to networking and marketing, and the level of risk that the individual strategy center should accept.

It is also important to test strategy center congruity. The results of analysis may show that the various systems properly support the selected strategies; however, when compared one against the other, it may be found that the systems are incongruent and would likely cause friction during the strategy implementation process. If this occurs, it is necessary to make adjustments before moving ahead with implementation.

As an example:

| | | |
|---|---|---|
| If | A. | educational programs are mature, high quality, well known, and viable |
| then | B. | selected strategies would reinforce the favorable strategic position |
| but if | C. | financial systems are conservative, aging, and cost (not revenue) oriented |
| and | D. | the administration is growth oriented and seeking new networks, markets, or strategy centers |
| and | E. | the network/marketing program is embryonic, |
| then | | |




Congruity adjustments should be made or the strategy center should accept a high level of risk in strategic implementation.

*Implementation*

Because there is wide variation in strategy center definition and in the selection of particular strategies, it is difficult to be prescriptive about implementation. Nevertheless, each strategy center will require an implementation program. Moreover, each implementation program will require, at minimum, these elements:

- Strategy identification;
- Beginning and ending dates of the strategy;

- Supporting programs and/or interrelationships between strategies;
- Resource allocation indices for each strategy including personnel, dollars, facilities and other resources;
- Performance measures and outcome indicators;
- Key strategy target dates;
- Alternative next steps depending on outcomes.

During implementation, an institution should begin preparations for the next cycle of strategic planning. Experience suggests that a two year strategic planning cycle is appropriate for most institutions.

## COMMENT ON PROCESS

Strategic planning is part of a larger challenge which might be called the management of diversity. The practice of strategic planning and management must take place at both the institutional and strategy center levels. Strategic planning also requires a cross-functional and cross-program approach. Experience has shown that this methodology must use a common analytic framework anc should draw upon the group efforts of those people who know the most about the institution and the individual strategy centers being analyzed. This calls for the involvement of principal administrators and managers (in theory or in fact) of the individual strategy centers. It is not suggested that this group will know, initially, all that is needed to carry out the required analysis and planning. It is these people, however, who have the responsibility for beginning the strategy development process and ultimate responsibility for the results.

It is also noted that this methodology is best used in a well considered and well defined manner. Strategic planning (or any other form of planning) can easily get out of control. Many financial, personnel, and time resources can be unwisely used if the process is not guided and limited in a fair way. On the other hand, there is never sufficient time or resource to plan "correctly." There is always another piece of data to be obtained, another computer run, more analysis, and the reconsideration of decisions already made. In response to this dilemma, it is beneficial to set reasonable limits on the planning process and to do the best job possible within those limits. Moreover, it is suggested that the strategic planning process should attempt to cover a broader scope in perhaps less detail as opposed to the reverse. Thus, a multi-year planning process which takes successive horizontal cuts at the planning problem is likely to be more effective than one which takes a detailed vertical approach without providing synthesis.

The process associated with this methodology also benefits from outside assistance. There is a great need for objectivity that is best provided by someone who has no personal interest in the results of the strategic planning activity. An outsider can also facilitate the process more easily than an interested party and ask those seemingly "foolish" questions that have a way of challenging basic assumptions.

### The Actors

The kind of strategic thinking that is called for here is concerned not just with what, but with why; not just with objectives, but with paths and relationships; not just with checklists, but with process. It goes beyond experience and held knowledge into the acquisition of new knowledge and open-ended exploration of issues. Experience tells us that strategy knows no rank; the "mind set" and skills required to "strategize" are found in individuals exercising many different functions and holding many different ranks in an institution. Strategic thinking is neither a

universal trait nor an exclusive attribute of academic, financial, or planning staffs or a prerogative of senior management - particularly in a multifunctional institution.

Because a track record of past success may act as an inhibiting factor in considering alternative paths to future success and because those closest to today's opportunities are often those least disposed to consider the futurity of their present decisions, institutions are urged to open up strategy developing and analysis to more functions and more ranks. This does not exclude the planning experts, but it increases the likelihood of hearing challenges and penetrating questions.

A predictable question in the area of strategic planning is "What should the role of the President be." In approaching diversity through a strategic process, he must see it as a manageable, exciting, continuous and normal condition of the job. He must bring together the skills needed to solve strategic problems. He may not be (and often is not) the world's greatest strategist, but he must be adept as a leader, interrogator, debator and conciliator.

The Procedure

Once an institution has become familiar with strategic planning and begins using it on a regular basis, the procedures for applying the methodology may vary widely. The process will be modified to a form which is consistent with the institution's planning and management style. However, the first time this methodology is applied, the institution is strongly advised to use the following procedure:

1. The objectives of the initial strategic planning activity should be:

   a) Introduce administrators to the methodology and promote institutional learning of strategic planning

   b) Provide administrators an opportunity to practice strategic planning

   c) Develop a draft strategic plan for the institution.

2. Allow two full days to conduct the initial strategic planning session. During the session, the following topics should be addressed:

   a) Introductory material
   b) Developing a context for strategic planning
   c) Defining strategy centers, industries and markets
   d) Assessing the strategic position of each strategy center
   e) Determining strategic thrusts

3. Separate the first and second strategic planning sessions by three or four weeks during which time the initial session is reviewed and "homework" assignments are completed.

4. For the second session allow three consecutive days and perhaps one or two evenings. The topics covered during this session should include:

   a) Situation analysis for individual strategy centers.
   b) Selection of strategies and performance profile development.
   c) Strategic analysis and congruency checks.

5. Separate the second and third sessions by three or four weeks, review second session, and complete homework assignments.

6. Allow two full days for the third strategic planning session. Cover the following:

   a) Implementation plans.
   b) Presentation of individual strategic plans.

At the end of the third session, the initial application of the methodology is completed. However, the institution may wish to allow an extra day sometime after the third session for review and the consideration of the next steps in what is an ongoing process.

Notes

In this strategic planning methodology, the second session is called a "Strategy Center Profile Session." A profile for a strategy center can be developed by the assembled management group of the unit in an intensive work period usually lasting three days. This is the normal time needed for the production of the initial strategic plan. In succeeding iterations, the process may take less time if conditions have not altered, or longer if a severe change in course is dictated either by conditions or institutional needs. Also, experience has shown that it is best to have the profiling session led by someone outside of the unit being profiled. This trained outsider need not be from outside the institution, but should not be there as a symbol of hierarchical authority. What is needed is an intelligent naivete about the strategy center.

In many instances, it is found that the management group has never before been assembled for the purpose of strategy development or if they have been together, it has been for the ritual of reciprocal defenence to one another's special expertise. Because of the use of a new common language denoting matrix positions, strategy types, congruency measures, and the other concepts inherent in the strategy center development system - a language neither solely that of the controller nor that of the academic vice president - the group quickly traverses the learning curve for genuine interdisciplinary dialogue.

A second note is that an institution may wish to follow each of the three strategic planning sessions, with two or three days of "institutional research" and/or general consulting provided by an outsider. The whole strategic planning group need not be assembled for these purposes; administrators can work alone or in small groups. In any case, the idea is the same - enhance the institution's planning capability while strategic thinking is fresh in the minds of the administrators.

## The Outsider's Role

For strategy centers and institutions in a state of transition, it is believed that strategy development is accelerated and enhanced by the presence of a trained "profiler" from outside the unit to provide objectivity and insight. The contributions of consultants to strategy development can vary widely, depending on the nature of the problem and the planning expertise available within the institution. One of the most critical functions of the consultant is to help the institution think through and implement changes in managerial systems and behavior to ensure their congruency with the nature of each strategy center.

These changes are not always obvious and are not easily brought about. When one member of a management team suggests that another member change established systems in the name of "congruent balance", problems arise. For this reason it is beneficial to have consulting teams composed of individuals with the multidisciplinary skills needed to deal with the downstream effects of strategy decisions.

Strategy development is a multidimensional process which involves externalities, internal political realities, micro-economics, sociology, and game theory - all in the context of a particular delivery system or industry. This calls for depth and diversity in the resources brought to it and for flexibility in the consultants' contribution.

## Time, Costs and Benefits

A strategic planning system can be installed in a relatively short time. Experience has shown that having once tested the system, the institution will push for rapid installation, fully realizing that all strategy centers must use the same vocabulary and criteria for analysis if the system is to be effective. From introduction to full installation, the process can be completed often within two years. This is not to suggest that it becomes part of the culture that soon, nor does it suggest that the process and its supporting systems are not being refined well within that period. However, the concepts and methodology can be effectively applied to real-time question of resource allocation within this time.

One reason for the relative ease and rapidity of understanding and installing the system is that most operating managers in multifunctional institutions already intuitively recognize that they need such a system.

They have chafed under highly proceduralized, ill-fitting, and burdensome uniform planning systems. The reams of material prepared for, submitted to, and often unread by superior levels in the organization have converted many highly intelligent unit managers into anti-planners. Moreover, the resource allocation process and decisions regarding acquisitions and appointment of personnel often seem somewhat arbitrary. Managers have always sought the underlying logic of institutional decisions in order to assess the justice of resource allocations and strategy restraints. Lacking a convincing rationale, and seldom included in the rigid processes, they have been less than fully committed to institutional plans.

Even when the ratio of benefits to costs is high, the costs should not go unnoted. The greatest cost of learning and installing such a system is in terms of time. It takes less time than that required of the typical "comprehensive planning system," but still requires time of some considerable magnitude and involves more managers, initially, than do traditional systems. Consultant costs depend, in large part, on how much of a joint undertaking the effort is. A close bilateral effort by the institution and consultant team hastens the transfer of knowledge and technique. Because this is challenging, difficult, and risky work, the costs are not trivial.

## CONCLUSION

Most institutions are looking for better ways of dealing with "unique" situations. The single performance measurement criterion is no longer being used with the same assurance that has been characteristic of the recent past. Increasingly, institutions are concerned that they maintain an organizational climate favorable to "renewal" - one in which embryonic ventures can flourish. What has become apparent is that if they are multifunctional they need to be managed much differently than if they are not.

The receptiveness to new approaches also stems in part from an uneasiness about and disappointment in "top-down" planning. In the past, the concept of centralization served as a control device and as such was called upon as a tool for managing great size and a stimulus to motivate administrators. Unfortunately, centralization has not led automatically to institutional performance optimization, nor has it created a convincing climate of "entrepreneurship." Unit managers have realized that across the board resource cuts and program postponements have made their roles and their motives something less than those of true entrepreneurs.

Compounding the complexity of both the opportunity and problems of managing diversity are some increasingly potent external variables. It is not only necessary to resolve conflict between the economic ends and the internal values and culture of the institution, but also to calculate the ever-changing cross-impacts and trade-offs among economic, social and political forces. Diversity, particularly in multifunctional institutions gives the president and strategists an opportunity to play what some have called the "ultimate matrix game" - dealing with the multiple impacts of multiple forces on multiple strategy centers in order to develop an institutional posture. With a system for classifying and developing strategies for diverse natural business units, institutional strategy development, performance analysis and resource allocation can be carried out efficiently and effectively.

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